

Consumption Of Most Products And

Product or Service	Cable HH vs. U.S. Average (Index)	Non-Cable HH vs. U.S. Average (Index)
Travel		
Business Travel	115	76
Vacation Travel	110	85
Car Rental	116	74
3+ Plane Trips	123	63
Member Frequent Flyer Program	115	77
Spent \$2,500+ On Travelers Checks	112	81
Leisure Activities		
Attend Movies	112	81
Play Golf	118	71
Attend Live Theatre	112	82
Go To Beach	112	80
Health Clubs	111	82
Roller Blading	112	87
Food and Beverage		
Instant Iced Tea Mix*	108	87
Bottled Water & Seltzer*	110	84
Low Calorie Domestic Beer*	111	83
Diet Cola Drinks*	111	83
Premium Champagne	114	78
Whole Coffee Beans	108	87
Imported Wine*	113	79
Automotive		
Bought New Car Last Year	116	74
Bought New Imported Last Year	120	67
Own New Luxury Automobile	115	77
Own New Sport Utility Truck	119	69
Own Four-Wheel Drive Automobile	116	75
Own New Domestic Automobile	115	76
Shopping & Retail		
Spend \$150+ In Food Stores (Av. Wk.)	108	86
Dry Cleaning	112	82
Flower By Wire	115	76
Spent \$750+ On Jewelry	124	62
Long Distance Bill \$60+	107	89
Spent \$500+ Catalog Mail or Phone Order	113	79

*denotes heavy use

Services Higher In Cable Households

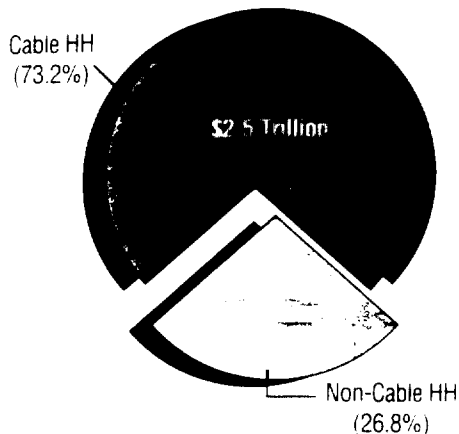
Product or Service	Cable HH vs. U.S. Average (Index)	Non-Cable HH vs. U.S. Average (Index)
Consumer Electronics		
Cellular Phone	116	75
Telephone Pagers/Beepers	119	69
Bought Home Computer	110	83
Compact Disc Player	113	79
Video Camcorder	113	79
Pre-Recorded Audio Tapes*	111	83
Financial/Investment		
2nd Mortgage (Equity Loan)	114	78
Belong To Credit Union	110	84
Education Loan	114	78
Own Any Stock	112	81
Use ATM	110	84
U.S. Savings Bonds	113	80
Money Market Funds	115	76
Mutual Funds	114	78
Use Credit Card (Personal)	108	87
Use Credit Card (Business)	112	80
Home Appliances (Purchased in Past Year)		
Burglar Alarm	110	83
Espresso/Cappuccino Maker	113	80
Electric Coffee Grinder	111	83
Gas Grill	112	81
Continuous Cleaning Oven	110	84
Electric Wok	112	80
Garage Door Opener	109	86
Central Air Conditioner	108	88
Pasta Machine	116	75
Home Furnishings (Purchased in Past Year)		
Sofa	115	76
Wall Unit	116	75
Wall-To-Wall Carpeting	113	79
Spent \$300+ Lawn/Porch Furniture	118	71
Spent \$700+ Box Spring/Mattress	123	63
Area Rug	113	78

The above indices represent just a sample of those found in the MRI CablePro Program available through CAB.

Marketing Value

Total Cable Household Income Reaches \$2.5 Trillion

Cable Homes Now Represent 73% of American Household Income



Cable Homes Grow More Affluent Over Time

From 1985 to 1992, the average cable household income rose 28% from \$32,182 to \$41,236. Over the same time span, the average non-cable household income rose only 14%. Today, the income gap between cable and non-cable homes is \$11,962—that's an 87% increase over the \$6,409 gap that existed in 1985.

Average Household Income

□ 1985 ■ 1992

Cable HHs



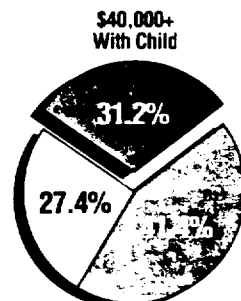
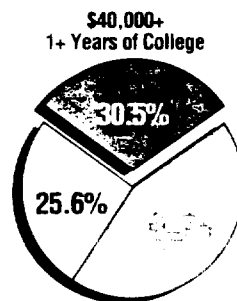
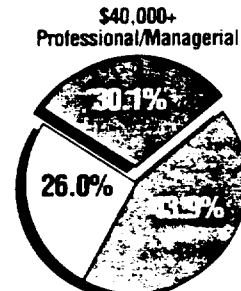
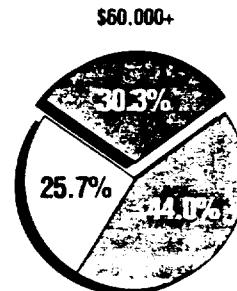
Non-Cable HHs



Basic Cable Captures Over 30% U.S. Share Of Total Day National Upscale Viewership

Total U.S. Homes

■ Basic Cable ■ ABC/CBS/NBC/FOX Networks □ National Syndication



Marketing Value

Basic Cable Viewership Skews Upscale (Total Day)

Total U.S. Homes

(Index To Total U.S. HH Share)

	\$60,000+	\$40,000+ Professional/Managerial	\$40,000+ 1+ Years College	\$40,000+ With Child
Basic Cable	111	110	112	114
ABC/CBS/NBC FOX Networks	103	103	103	97
National Syndication	86	87	85	92

Broadcast Network Upscale Delivery Falls Behind Population Growth

As Upscale U.S. Population Rises...

Adults 25-54 In HHs...	1992/93	1991/92	+/- Change
\$60,000+ HH Income	31,088,333	29,445,833	+1,642,500
\$40,000+ Prof./Mgr	24,342,500	24,045,000	+297,500
\$40,000+ 1+ Yrs. Coll	35,930,833	34,471,666	+1,459,167
Head of HH 4+ Yrs. Coll	29,523,333	29,074,166	+449,167

...Avg. 4-Network Primetime Delivery Falls

Adults 25-54 In HHs...	1992/93	1991/92	+/- Change
\$60,000+ HH Income	1,856,943	1,891,870	-34,929
\$40,000+ Prof./Mgr	1,445,251	1,594,045	-148,794
\$40,000+ 1+ Yrs. Coll	2,173,394	2,274,429	-101,035
Head of HH 4+ Yrs. Coll	1,698,147	1,870,868	-172,721

NFL On Cable Attracts Higher Upscale Demos Than Broadcast Network

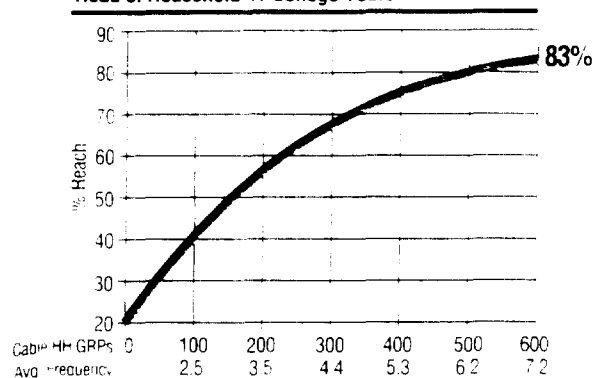
It is well established that cable homes are larger and more affluent than non-cable homes. This upscale cable household "filter" allows cable programming to attract a more upscale viewer than broadcast network television since basic cable impressions do not spill over, like broadcast, into less affluent non-cable homes. As can be seen below for NFL Football, cable's reach index against larger and more affluent homes is significantly greater than the reach index for broadcast. The same is true for new car and truck prospects.

% Reach Index: Household Characteristic To Total

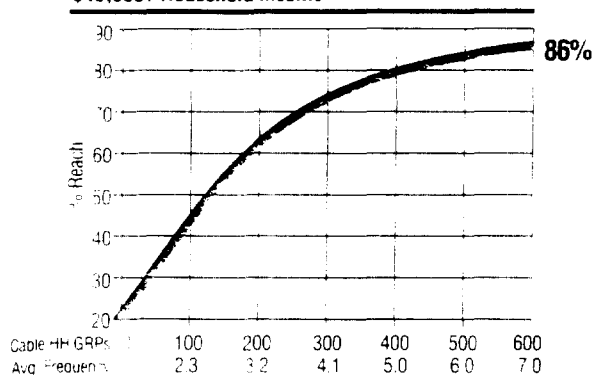
Household Characteristic	Basic Cable	Broadcast Networks
HHI < \$20,000	60	89
HHI > \$50,000	133	108
New Car Prospect	123	107
New Truck Prospect	137	108
HH Size 1	56	85
HH Size 4+	121	110

Cable Reaches Upscale Homes

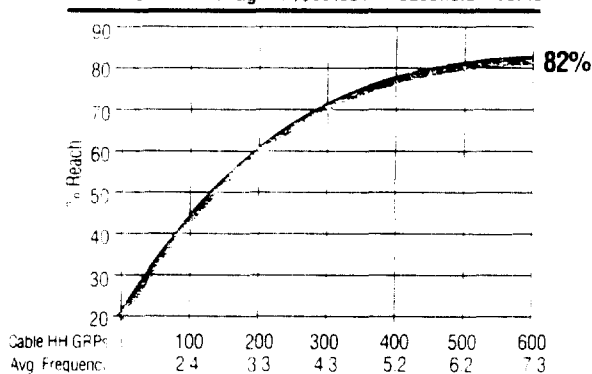
Head of Household 4+ College Years



\$40,000+ Household Income



Professional or Managerial/\$30,000+ Household Income



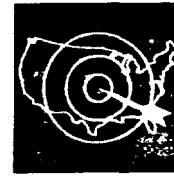
Base: Total Cable HHs, 4-Week Reach, ROS

Marketing Value

Heavy Cable Viewers Are Upscale

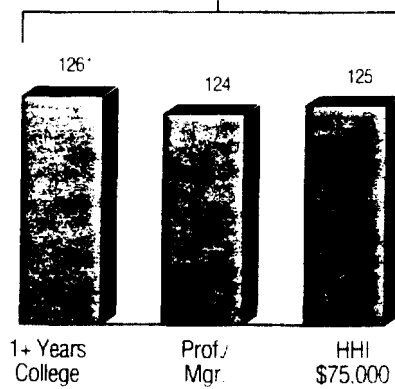
In a special analysis, adults 18+ were divided into several categories based on their amount of viewing to cable and broadcast network television. Below are two of these categories which represent 16.5% of total U.S. adults 18+ (Heavy Cable & Light Network Viewers) and (Light Cable & Heavy Network Viewers).

As can be seen below, the heavy viewers of cable (7.5+ hours weekly), who are also light network viewers (<4.5 hours weekly), index well against upscale demographic breaks. Conversely, Light Cable & Heavy Network Viewers index at or below 100 for upscale demographics.

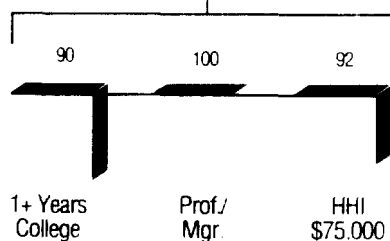


MEDIA PLANNING

Heavy Cable/Light Network



Light Cable/Heavy Network



*To be read: Heavy cable viewers, who are also Light network viewers, are 26% more likely to have 1+ years of college than all adults 18+ in the U.S.



MEDIA PLANNING

In an environment of proliferating media options, there is a growing amount of quantitative and qualitative data that document cable's ability to enhance television media plans. The data in this section identifies key areas where cable television clearly optimizes advertisers' return on their media investment.

- **IMPRESSION DELIVERY**

With most products purchased equally across broadcast-viewing quintiles, allocating a significant portion of the broadcast budget to cable can help align impression delivery with purchase potential across these quintiles. CAB's Q-Max study illustrates the growing importance of using more cable to compensate for broadcast network underdelivery.

At the same time, studies show that re-allocating significant portions of a broadcast budget to cable will produce dramatic improvements in reach, frequency and desired distribution of impressions without any increase in the media budget.

- **DEMOS**

Cable delivers high reach across a wide range of age/sex usage demos, including Kids 2-11 and car and truck buyers. In targeting kids, cable accounts for 85% of all weekly kid hours provided by television. Also, kids in cable households spend nearly twice as much time watching children's programs than their non-cable counterparts.

- **IMPACT OF RATINGS ON VIEWER ATTENTIVENESS**

Research finds that there is no direct correlation between a program's rating size and a viewer's attentiveness level, meaning high ratings don't necessarily ensure greater viewer involvement with advertising.

Attentiveness Levels Not Affected By Program Rating Size

There is a generally held assumption that low program ratings reflect a lack of interest and attention on the part of the viewer. In turn, a lack of viewer involvement, so the rationale goes, creates a poor advertising environment for the brand's television campaign.

In their bi-annual survey, Mediarmk Research Inc. (MRI) asks respondents whether they were paying "Full," "Most" or "Some" attention to a variety of broadcast network programs.

The following study demonstrates that absolute rating size (as measured by Nielsen) is not related to "Full" attention viewing. For example, the 13 programs with the highest A18+ rating (12.2) have a median "Full" attention score of 64.3%. The 13 programs with the lowest A18+ rating (5.4) have a 64.1% score. In essence, no difference.

When a viewer chooses a program—whether broadcast or cable—that choice is a very personal one based on interest, curiosity, etc. A viewer's attentiveness level for a given program is not affected by the absolute number of viewers for that program.

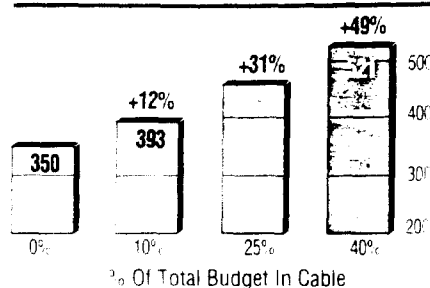
65 Primetime Broadcast Network Programs

Number of Programs	Average Adult 18+ Rating	% Adults 18+ Paying Full Attention to Program
13	12.2	64.3%
13	10.4	65.0%
13	8.4	66.5%
13	6.9	64.9%
13	5.4	64.1%

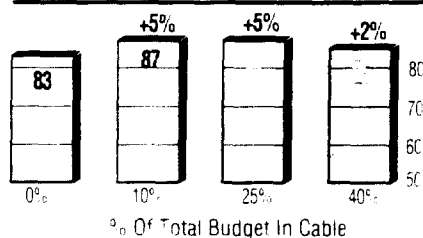
Optimix: Improving The Effectiveness Of A Television Budget

Dramatic increases in penetration and audience, coupled with continued efficiencies, have enabled cable to play a major role in helping advertisers maintain national reach and frequency levels while controlling cost. Optimix is a study which analyzes the impact of adjusting television budgets by adding increasing amounts of cable. The findings are that the yields of cable-enriched plans with up to 25%, or even 40% of the budget in cable are substantially greater than broadcast-only in the delivery of total U.S. gross rating points and frequency. Importantly, there is no sacrifice in U.S. reach. In fact, there are significant increases in most instances. Below, for example, is a base plan of 350 broadcast rating points in primetime. Note the change when cable replaces broadcast (same budget):

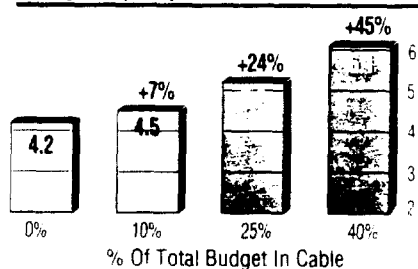
U.S. GRPs



% U.S. Reach



Average Frequency



Base: Total U.S. TV HHS, Network TV, Primetime, Cable, ROS

Below are Optimix examples for various demographics at a prototypical broadcast level of 250 GRPs

Men 18-34

	% Of Total TV Budget In Cable			
	0%	10%	25%	40%
U.S. GRPs	250	281 (+12%)	327 (+31%)	372 (+49%)
% U.S. Reach	66%	71% (+8%)	74% (+12%)	74% (+12%)
Avg. Frequency	3.8	3.9 (+3%)	4.4 (+16%)	5.0 (+32%)

Men 25-54

	% Of Total TV Budget In Cable			
	0%	10%	25%	40%
U.S. GRPs	250	281 (+12%)	327 (+31%)	372 (+49%)
% U.S. Reach	70%	76% (+9%)	78% (+11%)	78% (+11%)
Avg. Frequency	3.6	3.7 (+3%)	4.2 (+17%)	4.8 (+33%)

Women 18-34

	% Of Total TV Budget In Cable			
	0%	10%	25%	40%
U.S. GRPs	250	281 (+12%)	327 (+31%)	372 (+49%)
% U.S. Reach	71%	74% (+4%)	76% (+7%)	75% (+6%)
Avg. Frequency	3.5	3.8 (+9%)	4.3 (+23%)	5.0 (+43%)

Women 25-54

	% Of Total TV Budget In Cable			
	0%	10%	25%	40%
U.S. GRPs	250	281 (+12%)	327 (+31%)	372 (+49%)
% U.S. Reach	74%	78% (+5%)	79% (+7%)	78% (+5%)
Avg. Frequency	3.4	3.6 (+6%)	4.1 (+21%)	4.8 (+41%)

Base: Total U.S. TV HHS, Network TV, Primetime, Cable, ROS

Broadcast Network CPMs Take Premium Plunge

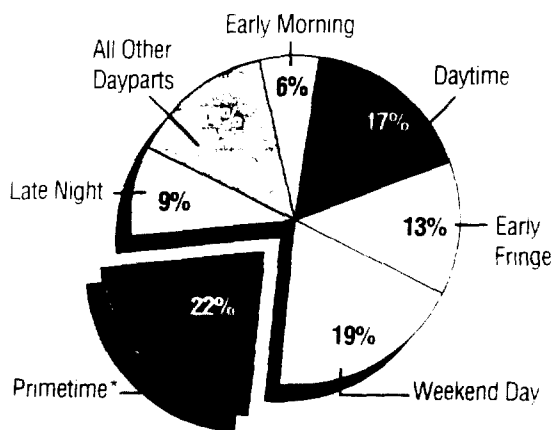
Throughout the 1980s, advertisers paid a broadcast network cost-per-thousand premium that exceeded the general rate of inflation. The reason for this disparity was pent-up demand for a dwindling supply of gross rating points. It now appears, however, that broadcast network CPMs are taking a direct hit from the continued erosion of broadcast viewing levels.

In the first half of 1993 (vs. 92), advertisers were willing to pay only an average 1.7 percent increase in unit cost for an average four-network delivery that decreased 2.1 percent. The net increase in broadcast CPM was 3.8 percent, versus double-digit increases seen in the past decade.

Broadcast Network CPMs

	1993 First Half	1992 First Half	% Change
Unit Cost	\$94,810	\$93,195	+1.7%
4-Network HH Delivery ('000)	10,147	10,360	-2.1%
Cost/1,000 HH	\$9.34	\$9.00	+3.8%

How Basic Cable Viewership Is Distributed Around The Clock

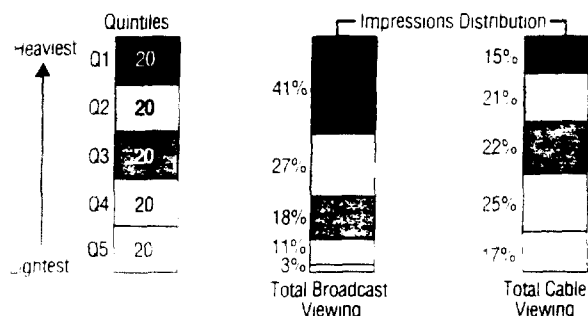


*To be read: an advertiser that buys cable run-of-schedule (24-hour basis) will receive approximately 22% of household impressions in primetime.

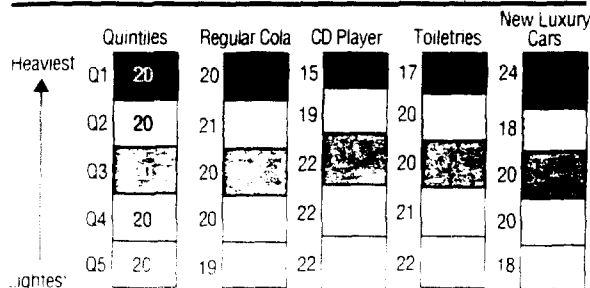
Q-Max: Aligning Impressions With Sales Potential

Advertising plans using prime broadcast TV as a base underdeliver the light broadcast viewer, while overdelivering the heavy broadcast viewer. A broadcast-only plan delivers 68% of all impressions against the heaviest 40% of broadcast TV viewers. Most products, however, from colas to luxury cars, are purchased equally across broadcast viewing quintiles. The Q-Max study shows that re-allocating a significant (50%) portion of the broadcast budget to cable can help advertisers align impressions with sales potential across the quintiles.

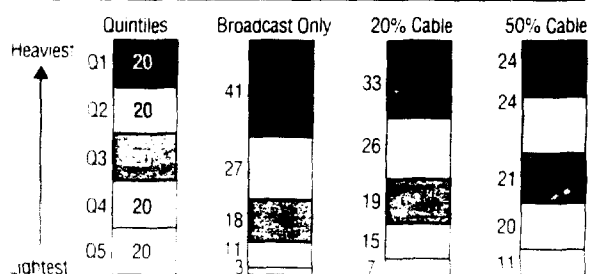
Primetime Broadcast Quintiles



% Product Purchase By Primetime Broadcast Quintile



% Impression Delivery by Quintile

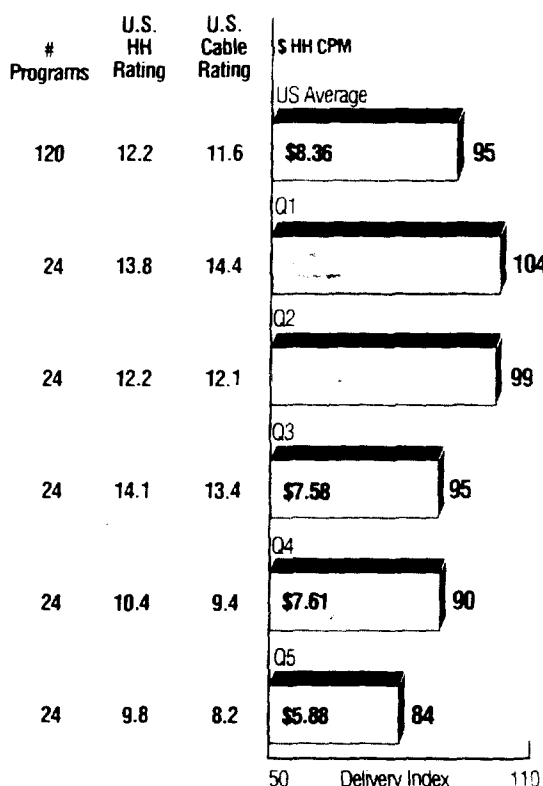


Primetime Sticker Shock: Delivering Cable Homes With Broadcast

On occasion, media planners/buyers may try to compensate for broadcast underdelivery of cable homes by cherry-picking certain broadcast network programs. The cost of doing so is cost prohibitive.

120 network programs were sorted from highest to lowest cable HH delivery. They were then divided into five even groups (or quintiles). The top 24 programs with the highest delivery (Q1-104 index) also have the highest average CPM of \$10.30. That's a 23% premium over the average HH CPM of \$8.36 for all programs which have collectively a 95 underdelivery index.

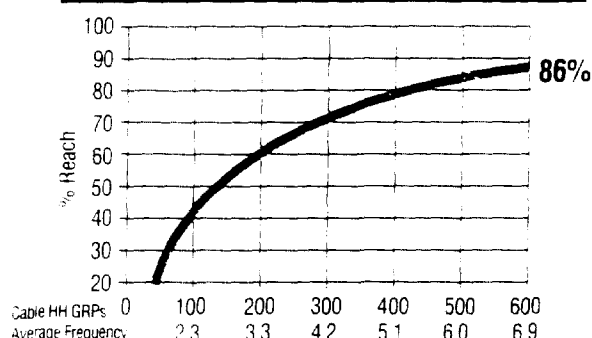
120 Primetime Broadcast Network Programs (sorted by cable HH delivery)



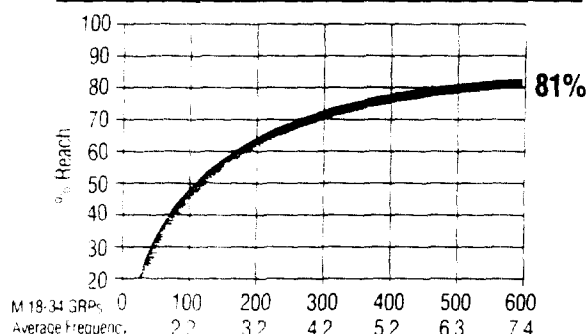
Cable Delivers High Reach

With the development of CableCume, CAB has documented proof based on Nielsen data that dispersed cable schedules can deliver high reach. Whether it's kids or adults, men or women, cable reaches your demographic target. CableCume is available on floppy disk for agencies and advertisers. For further information call CAB at (212) 751-7770.

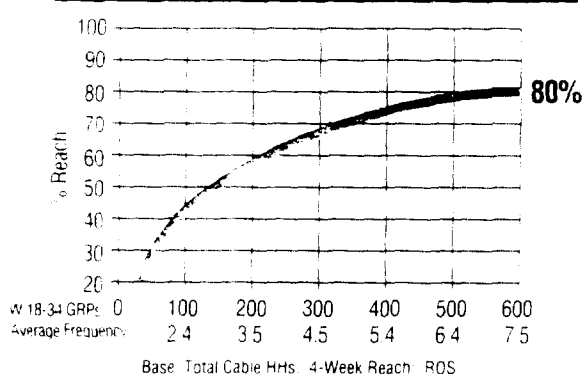
Total Cable HHs



Men 18-34

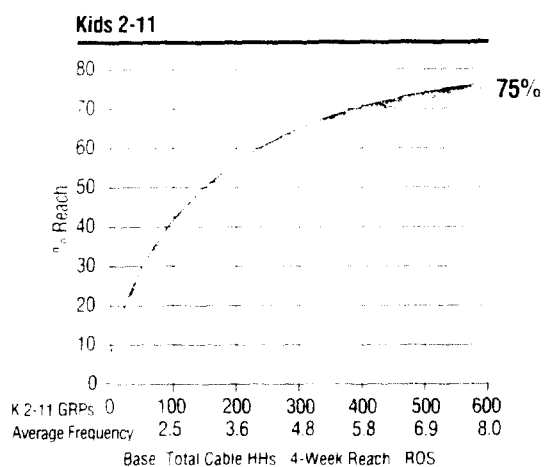
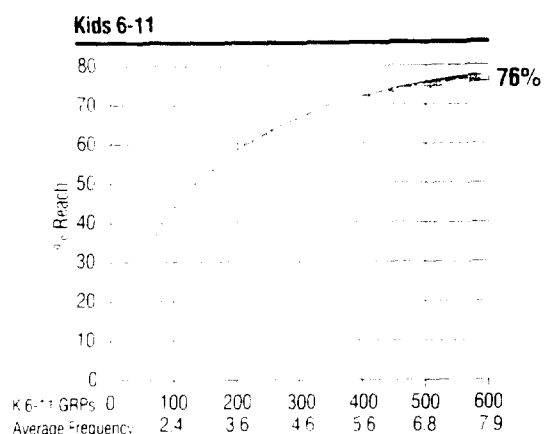
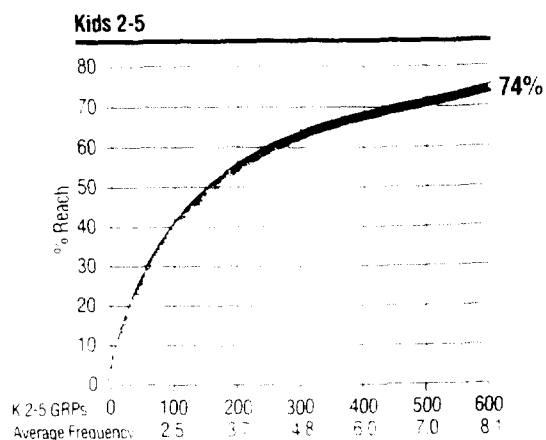


Women 18-34



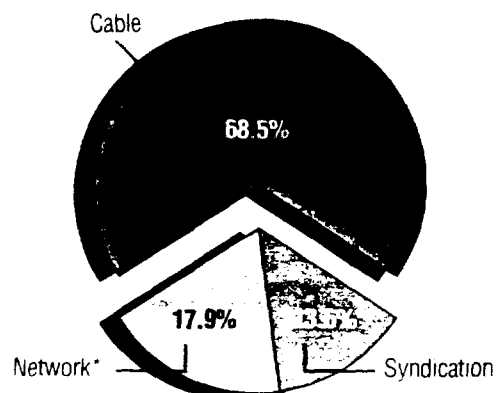
Media Planning

Cable Reaches Kids



Kids' Cable Programming Gets Dominant Share Of Viewing In Cable Households

Share Of Viewing To Kids' Commercial Programming By Cable Kids 2-11



*Includes FOX

Cable Provides More Kids' Programming

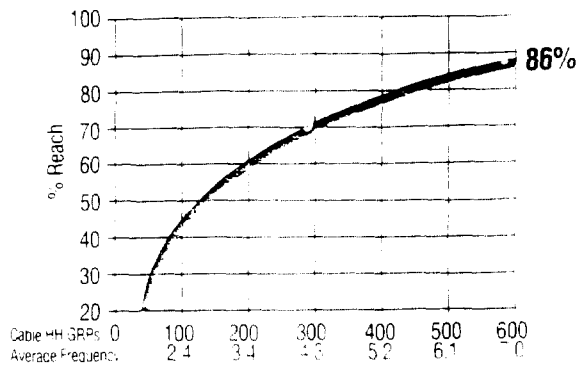
	No. of Hours	% of Kids' Programming Hours (Weekly)
Cable	386.3	84.3%
All Other Sources	71.8	15.7
	458.1	100.0%

Kids In Cable HHs Watch More Kids' TV

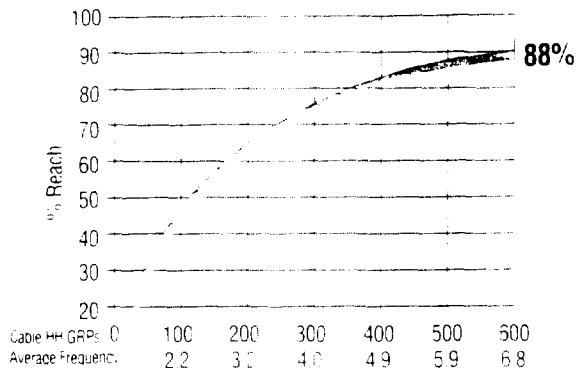
	Cable	Non-Cable
Cable	3.56 Hrs.	—
Syndication	71 Hrs.	1.21 Hrs
Network (incl. FOX)	93 Hrs.	1.48 Hrs.
Average Weekly Hours Of Kids' Viewing To Kids' Programming	5.20 Hrs	2.69 Hrs

Cable Reaches Car And Truck Buyers

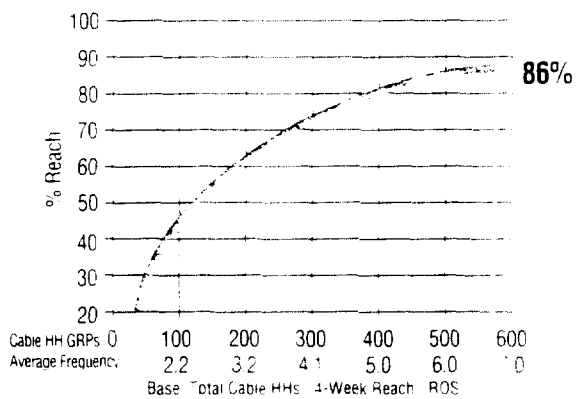
New Car Prospects



Own Two or More Cars



New Truck Prospects



Cable Universe Captures Majority Of New Car Prospects*

	Universe Estimates		Percent Penetration	
	Cable HHS (000)	Non-Cable HHS (000)	Cable HHS	Non-Cable HHS
Total HHS	14,958	4,902	75.3%	24.7%
Men 18+	15,296	4,576	77.0%	23.0%
Men 18-34	6,028	1,533	79.7%	20.3%
Men 18-49	10,257	3,071	77.0%	23.0%
Men 25-54	9,281	2,553	78.4%	21.6%
Men 55+	3,998	1,330	75.0%	25.0%
Women 18+	16,775	5,231	76.2%	23.8%
Women 18-34	6,575	1,655	79.9%	20.1%
Women 18-49	11,248	3,445	76.6%	23.4%
Women 25-54	9,594	3,301	74.4%	25.6%
Women 55+	4,120	1,422	74.3%	25.7%
Adults 18+	32,071	9,807	76.6%	23.4%
Adults 18-34	12,603	3,188	79.8%	20.2%
Adults 18-49	21,505	6,516	76.7%	23.3%
Adults 25-54	18,875	5,854	76.3%	23.7%
Adults 55+	8,118	2,752	74.7%	25.3%

*New car prospects defined as a home that previously purchased a new car but hasn't done so in the past 3 model years

Newspaper Readership vs. Ad Exposure

Section of Newspaper	For Every 100 Adults Who Read Any Daily Newspaper # Of Adults Who Read/Looked Into Section
Front	100	69
TV/Radio Listings	100	43
Editorial	100	42
Sports	100	39
Business/Finance	100	37
Classified	100	36
Movie	100	35
Food/Cooking	100	32
Home	100	26
Science	100	23
Fashion	100	21

Local Cable Provides Geographic Fit For Grocery Stores

One of the key benefits that local cable offers advertisers is the ability to pinpoint impressions geographically. According to data from MediaMark Research, Inc. (MRI), 81% of all adults in the average market travel only 5 miles or less to shop for groceries. Within cable homes – 83% of all adults. The use of broadcast television would inevitably spill advertising impressions beyond the 5 mile limit where the majority of the store's customers reside. A cable franchise that surrounds a particular store, however, would offer practically no geographic waste.

How Far Shoppers Usually Travel For Groceries...

	Total Adults 18+ (000)	Percent	Cume Percent
<1 Mile	38.233	23.1	23.1
1-2 Miles	51.102	30.9	54.0
3-5 Miles	44.292	26.7	80.7
6-10 Miles	18.824	11.4	92.1
11+ Miles	13.180	8.0	100.0
Total	165.631		



DIRECTORY



APPENDIX K

Television Bureau of Advertising, *The World According to Cable and a Second Opinion*, 1994

Television Bureau of Advertising, *Political 94*, excerpt

Television Bureau of Advertising, *The Pricing of Cable vs. Broadcast Television*, 1995



The *World* **According** **to** **Cable** *and* **a Second** **Opinion**

*A **TMR** Research Report*

The Television Bureau of Advertising represents over-the-air television stations to the advertising community. Its goal is to develop and/or increase advertiser dollars to U.S. spot television.

To further that goal, the purpose of this report is to expose some of the myths and misconceptions that have grown about cable TV as an advertising medium and to reinforce the inherent advantages of using over-the-air spot television to get advertising messages to the consumer.

Harold Simpson
VP, Research & Development

Television Bureau of Advertising
850 Third Avenue
New York, NY 10022-6222

Introduction

We searched far and wide to find an appropriate quotation to act as a preamble to this presentation.

We think we have found one.

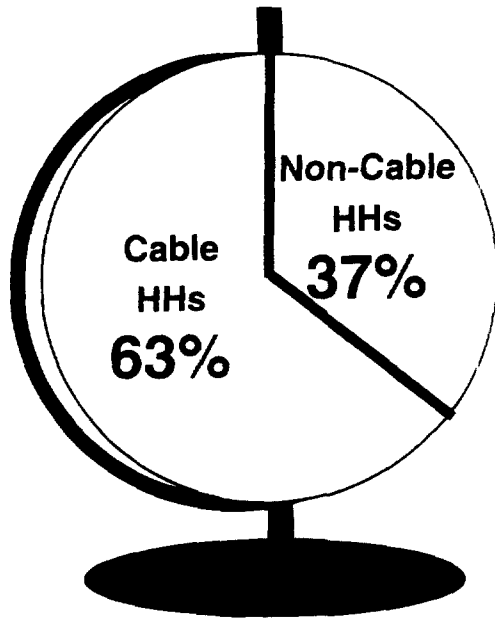
“Often it is the articulation of the nomenclature coupled with the verbal and nonverbal pyrotechnics that supersede the reality of a given situation.”

Attributed To:
Terrence “Hulk” Hogan
Late 20th Century

Breaking through the sheer elegance of Mr. Hogan’s prose, the message becomes clear:

The way we label things can
influence the way we think about
and act on them.

...read on



The cable folks would like you to look at the world this way.

If you buy this, they will tell you more.

Source: A.C. Nielsen. NSI. Feb. '94

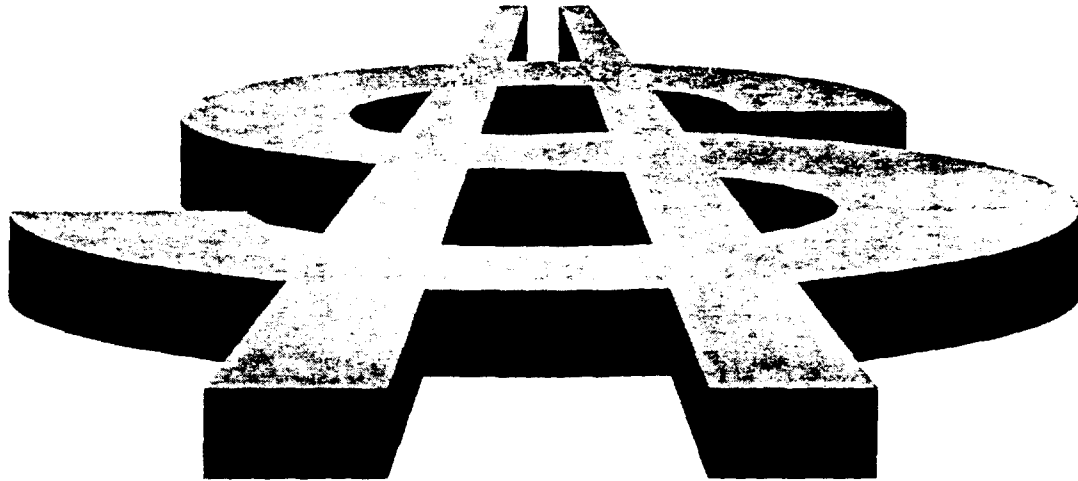
They will tell you about the people living in cable households and those in non-cable households.

They will say that:

<i>People in cable households...</i>	<i>People in non-cable households...</i>
<ul style="list-style-type: none"> • Have higher incomes • Are better educated • Are more apt to be professionals & managers • View more television • View more cable TV • Buy more of your products 	<ul style="list-style-type: none"> • Have lower incomes • Are less educated • Are more apt to be blue-collar workers • View less television • View no cable TV • Buy less of your products

You're impressed. Who wouldn't be?

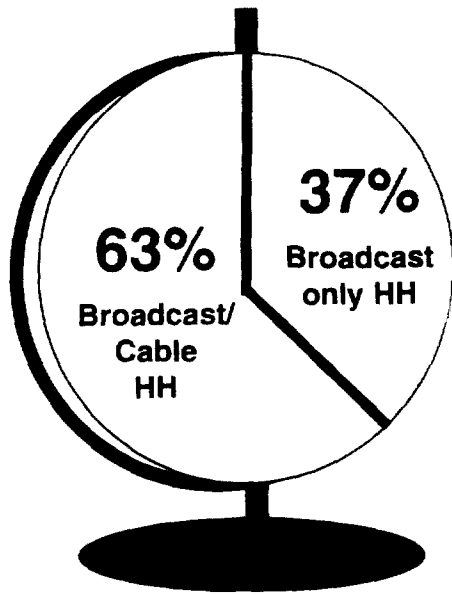
If they think
you have bought into this,
they're ready to ask for your money.



And you may just give it to them...
you're sold!

At this point, if they were three-card Monte
players, they would say

GOTCHA!
You've bought into the scam.



All right, now let's take a look at the world the way it really is.

What does this mean?

Source: A.C. Nielsen NSI, Feb. '94

It means that:

Broadcast/cable households receive over-the-air broadcast signals and cable networks via a cable connection to their home.

Broadcast only households receive only the signals of broadcast stations over the air.

Summary	Via Cable	Over the air	Total
Broadcast Signal	63%	37%	100%
Cable Signal	63%	- -	63%

Broadcast can reach every household while cable misses one in three.

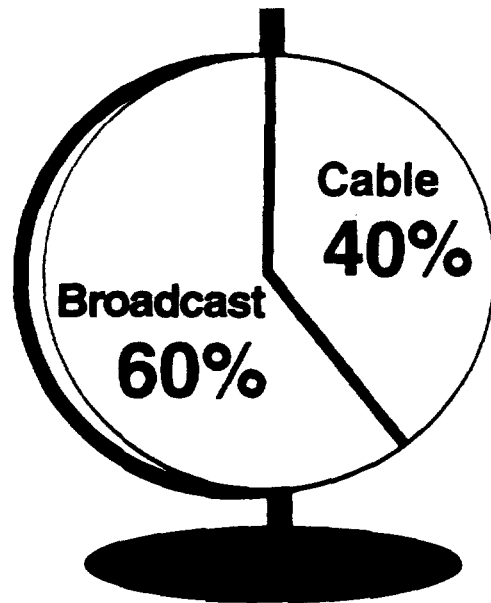
So, when cable says their households...

- **Have higher incomes.**
- **Are better educated.**
- **Have more professionals and managers.**
- **Buy more of your products.**

Remember that they are also **broadcast** households.

And broadcast can deliver all of these homes and the additional 37% as well.

How about the statement that “cable households” view more cable. Well, that’s true. Non-cable households can’t receive any cable programming.... But did you know that “cable households” view **more broadcast TV** than cable TV...a lot more!



Source: A.C. Nielsen/NTI Cable TV Status Report
March 1994

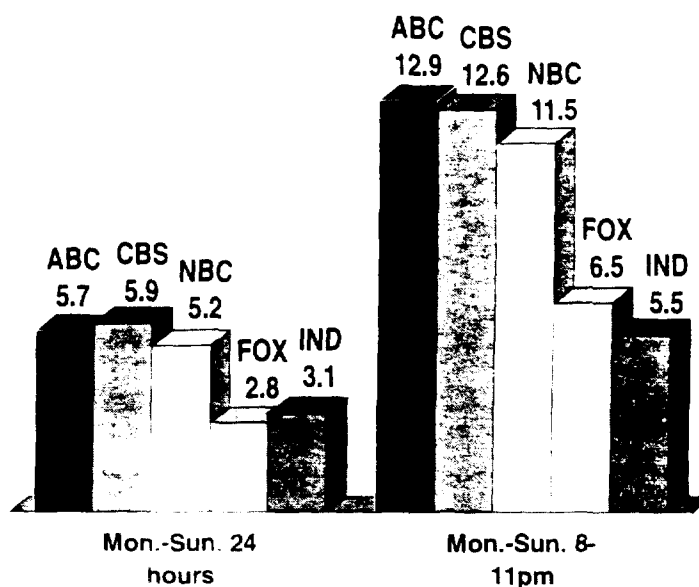
Now let's look at the all-important size or density of the delivered audience, broadcast vs. cable. You will see that the differences are significant.

While the affiliated stations* achieve a five to six average-minute household rating on a 24-hour basis and an 11 to 13 rating in primetime, the leading cable networks don't even reach a one rating on a 24-hour basis and only four manage to get into the 1.0 to 1.4 range in primetime.

*ABC, CBS, NBC

Average Ratings/Broadcast vs. Cable

Average Minute Household Audience (AA%)
Broadcast by Affiliation



Cable Networks

(Ad supported)

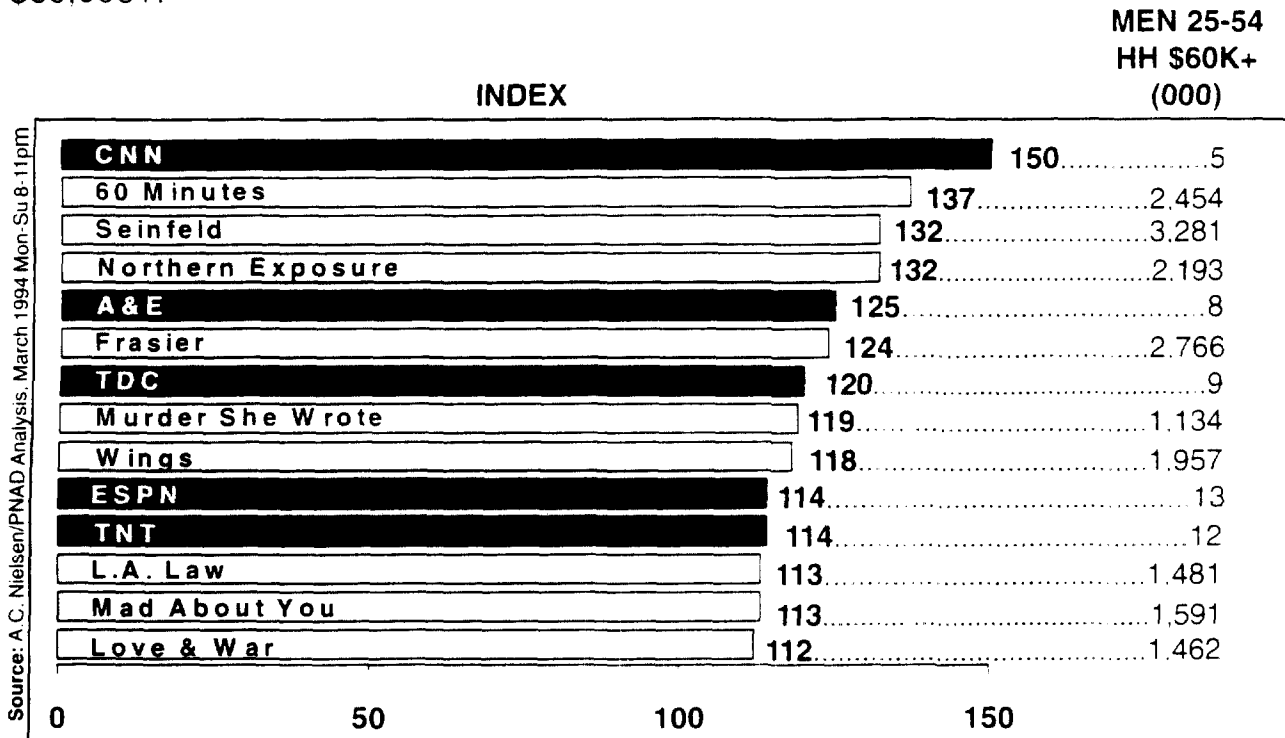
	Mon-Sun 24 hours	Mon-Sun 8-11pm
A & E	0.4*	0.5
CNN	0.4	0.6
Disc	0.3*	0.6
ESPN	0.6	1.2
Fam	0.3	0.6
HLN	0.2	0.2
Life	0.4*	0.6
MTV	0.3	0.4
Nick	0.6	0.7
TBS	0.9	1.4
TNN	0.3*	0.6
TNT	0.6	1.1
USA	0.7	1.4

Source: A.C. Nielsen/NHI Cable Activity Report Fourth Quarter, 1993

* Less than 24 hours

Now let's examine their claim that they can reach **high-income viewers** better than broadcast TV.

Here is an example of selected broadcast programming that index as well as the best of the cable networks among men 25-54 in households with incomes of \$60,000+.



And in terms of density, it's no contest. Cable delivery is in the thousands... broadcast delivery is in the **MILLIONS**.

This pattern can be replicated for ALL DEMOGRAPHIC AND LIFESTYLE TARGETS.

It will work for

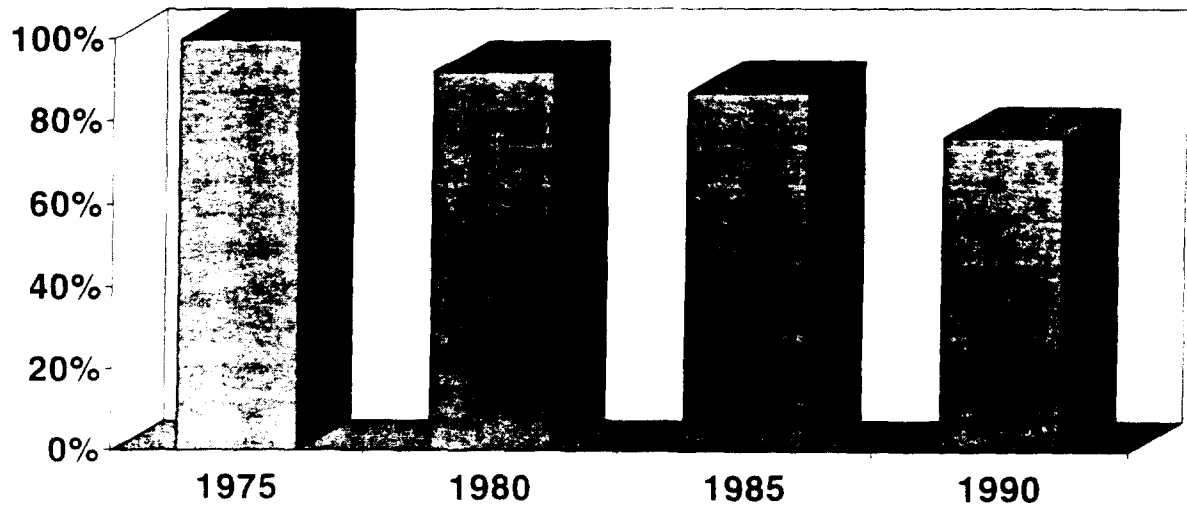
Generation X	The Mature Market
Dinks	Yuppies
Baby Boomers	Empty Nesters
Working Women	...you name it

Yes, cable can deliver a niche as they claim, but it's a MICRO-NICHE. It's the people you want to reach, but not many of them

By choosing the right dayparts, program types and programs, broadcast television can also deliver a niche. But it's a MACRO-NICHE... the right people in a density that will impact the marketplace.

The cable people have been quick to point out the declining share of viewing to broadcast television over the years since the advent of cable programming.

Broadcast's Share of Viewing (24 hours, Mon-Sun)

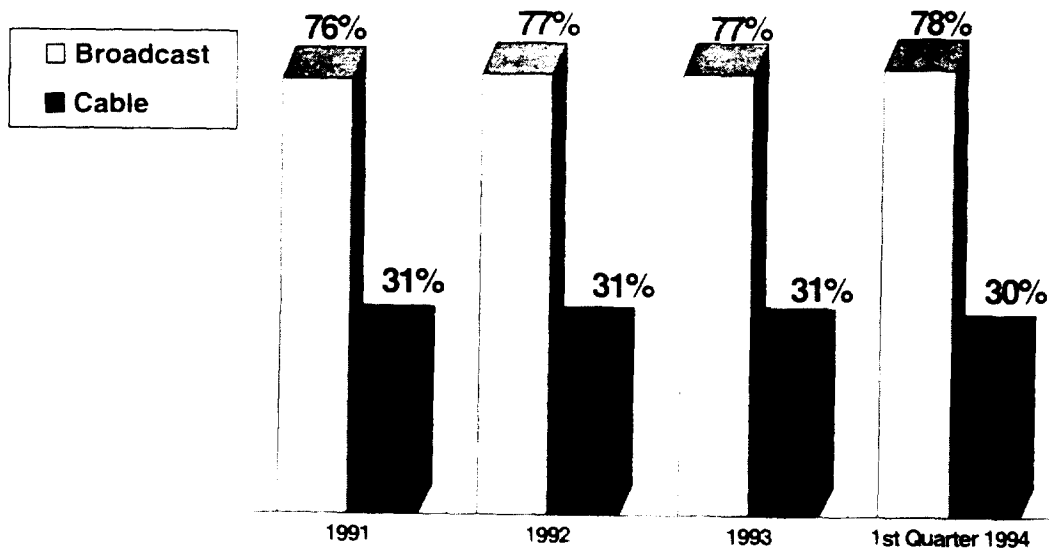


Source: A.C. Nielsen

But have you seen the figures lately?

Here's a look at the share figures for the last four years.

Share of Viewing (%) (24 hours, Mon-Sun)



Source: A.C. Nielsen

Note: Adds to more than 100% because of simultaneous viewing.

The numbers have stabilized with broadcast the clear leader.

Now here's a set of numbers the cable people won't show you. They demonstrate that the leading cable networks' ratings are not growing.

In fact, most of the major cable networks show losses or no gains while only two increased.

**Ad-Supported Cable Network
Total U.S. Household Rating Trends**
(Prime/Mon-Sun 8-11 pm)

	1st Q '92	1st Q '94	Index 1992=100
A&E	0.5	0.6	120
CNN	0.6	0.6	100
Disc	0.7	0.7	100
ESPN	1.1	0.8	73
Fam	0.6	0.6	100
HLN	0.2	0.2	100
Life	0.7	0.6	86
MTV	0.4	0.4	100
Nick	0.6	0.7	117
TBS	1.4	1.3	93
TNN	0.8	0.6	75
TNT	0.9	0.9	100
USA	1.6	1.6	100

Source: A C Nielsen Cable Activity Reports

And the ranks of the cable networks continue to grow, further fragmenting their audience.

Here's a list of some of the recent arrivals and others that are to be launched in 1994.

And there will be more coming. If the current trend continues, they will draw their audiences from existing cable channels, not from broadcast television.

ESPN2	The Golf Channel
Prime Sports	Health & Fitness
TV Food	The Health Channel
America's Talking	The History Channel
BET on Jazz	Home & Garden
CNN International	Ovation
Catalog 1	The Talk Channel
FX (Fox)	Talk TV Network
Fitness & Exercise	Turner Classic Movies
The Game Channel	

What Does A Cable Rating Represent?

It depends. Whether it appears in an ad, a promotion piece, a trade press article, or even a rating book, you have to ask yourself “on what universe is this rating based?”

Here’s an example, let’s say the XYZ cable network promotes getting a 1.2 household rating last night . . . not bad, you say, but on what universe was the rating based? You find it’s a coverage area rating.

Let’s see how that nets down:

Universe	HH Rating
XYZ’s Coverage Area (59% TVHH)	1.2
Cable Households (63% TVHH)	1.1
TV Households (100%)	0.7

So when comparing it to broadcast rating, the 1.2 rating actually becomes a 0.7. And whether they use the 1.2, the 1.1, or the 0.7, they still deliver the same number of households, about 660,000.

When looking at a cable rating, we think the old phrase ***Caveat Emptor*** (let the buyer beware) is appropriate.